

Slide 1 - Title

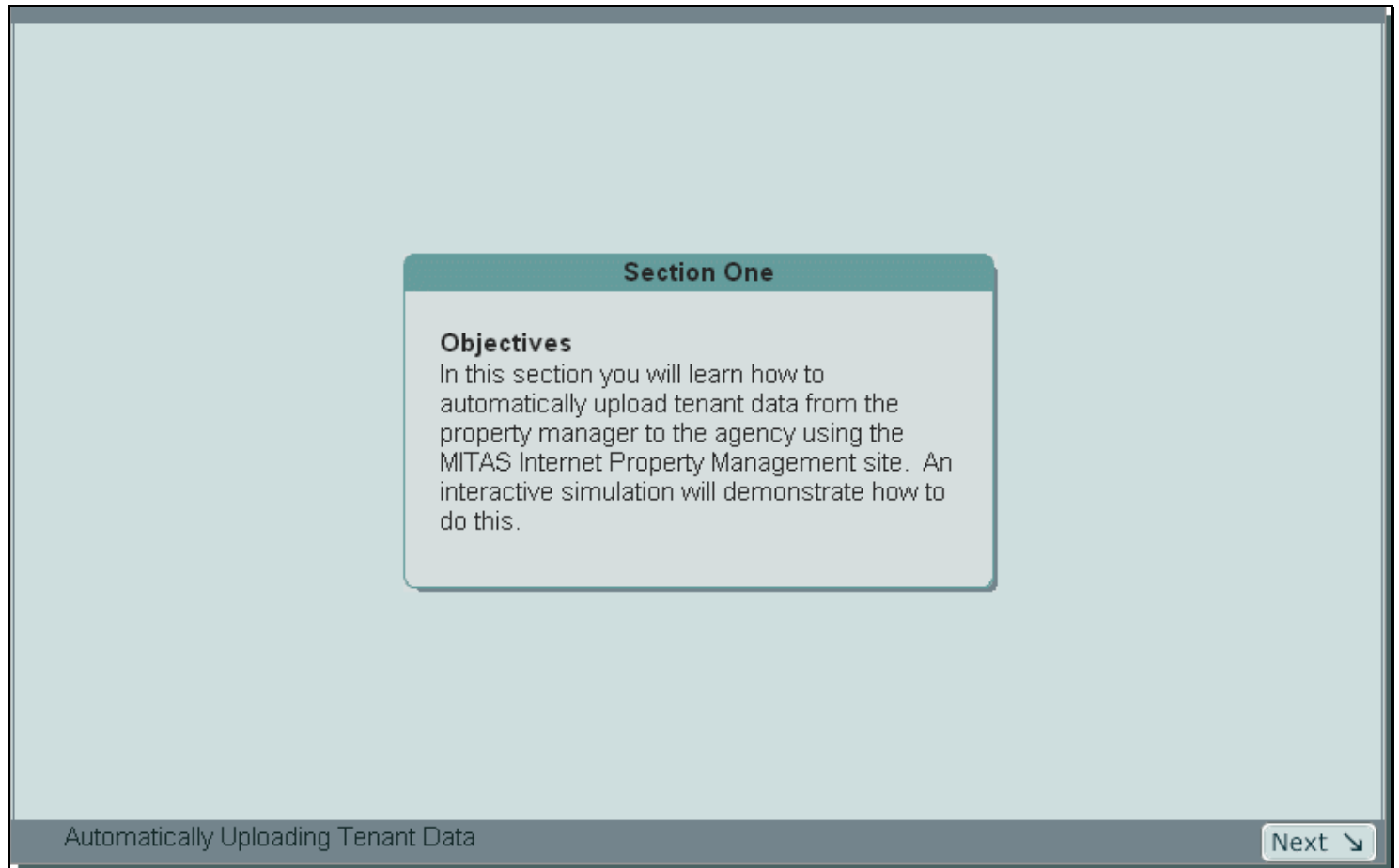


Text Captions

Compliance Automatic Tenant Data Upload on the MITAS Internet Property Management site

Notes

Slide 2 - Objectives

A presentation slide with a light blue background. In the center is a white box with a teal header labeled "Section One". Inside this box, under the heading "Objectives", is a paragraph of text. At the bottom of the slide, there is a dark teal footer bar containing the text "Automatically Uploading Tenant Data" on the left and a "Next" button with a right arrow on the right.

Section One

Objectives
In this section you will learn how to automatically upload tenant data from the property manager to the agency using the MITAS Internet Property Management site. An interactive simulation will demonstrate how to do this.

Automatically Uploading Tenant Data [Next](#)

Text Captions

Section One**Objectives**

In this section you will learn how to automatically upload tenant data from the property manager to the agency using the MITAS Internet Property Management site. An interactive simulation will demonstrate how to do this.

Notes

Slide 3 - Scenario

Scenario

Sara, a property manager calls you...

"Hi Becky, I'm trying to upload my tenant data automatically to the agency using the MITAS Internet Property Management site for the first time. How do I do this?"

Let's find out how we can help Sara.

Uploading Tenant Data

Sara at her desk

Next ➤

Text Captions**Scenario**

Sara, a property manager calls you...

"Hi Becky, I'm trying to upload my tenant data automatically to the agency using the MITAS Internet Property Management site for the first time. How do I do this?"

Let's find out how we can help Sara.

Notes

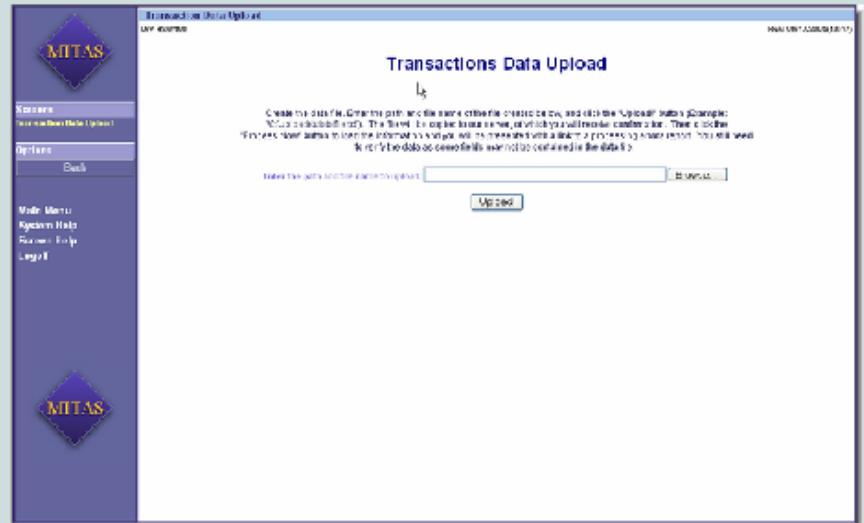
Slide 4 - Concept

How to Upload Tenant Data

It is easy to upload tenant data to the agency using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Compliance**.

Then you retrieve the property from the **Property / Project** screen. You choose the **Transactions Upload** option, and the **Transactions Upload** page is displayed. Input the **Path and File Name** to upload, and press the **Upload** button.

Once your data has been uploaded, you review the tenant data and then input additional information as required by your agency.



Tenant Data Upload page

Next

Text Captions

How to Upload Tenant Data

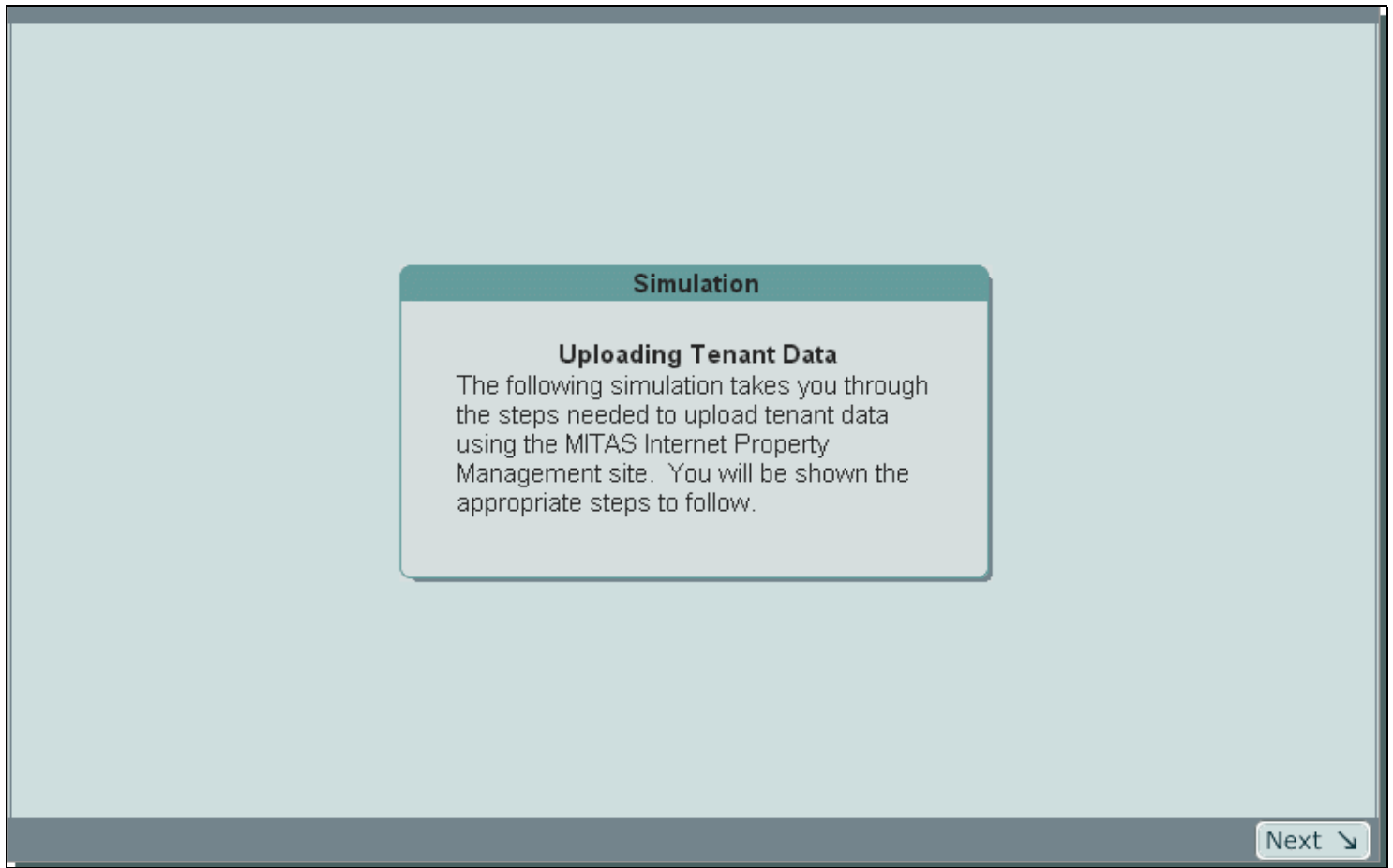
It is easy to upload tenant data to the agency using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Compliance**.

Then you retrieve the property from the **Property / Project** screen. You choose the **Transactions Upload** option, and the **Transactions Upload** page is displayed. Input the **Path and File Name** to upload, and press the **Upload** button.

Once your data has been uploaded, you review the tenant data and then input additional information as required by your agency.

Notes

Slide 5 - Simulation

A presentation slide with a light blue background. In the center is a white rectangular box with a teal header bar. The header bar contains the word "Simulation" in white. Below the header, the box is titled "Uploading Tenant Data" in bold. The text below the title describes a simulation for uploading tenant data using the MITAS Internet Property Management site. In the bottom right corner of the slide, outside the central box, is a "Next" button with a right-pointing arrow.

Simulation

Uploading Tenant Data

The following simulation takes you through the steps needed to upload tenant data using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

Next ➤

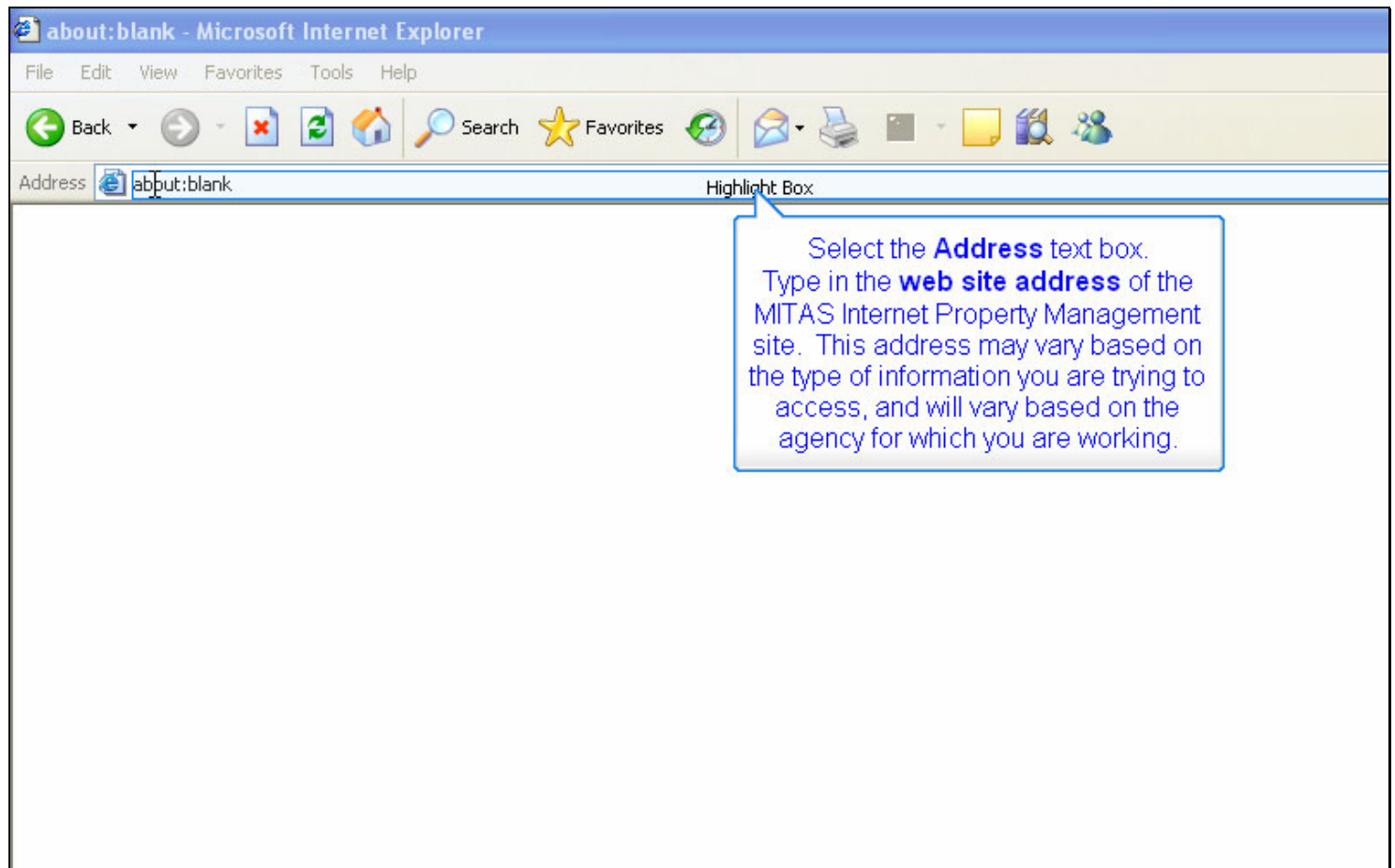
Text Captions

Simulation**Uploading Tenant Data**

The following simulation takes you through the steps needed to upload tenant data using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

Notes

Slide 6 - Slide 6

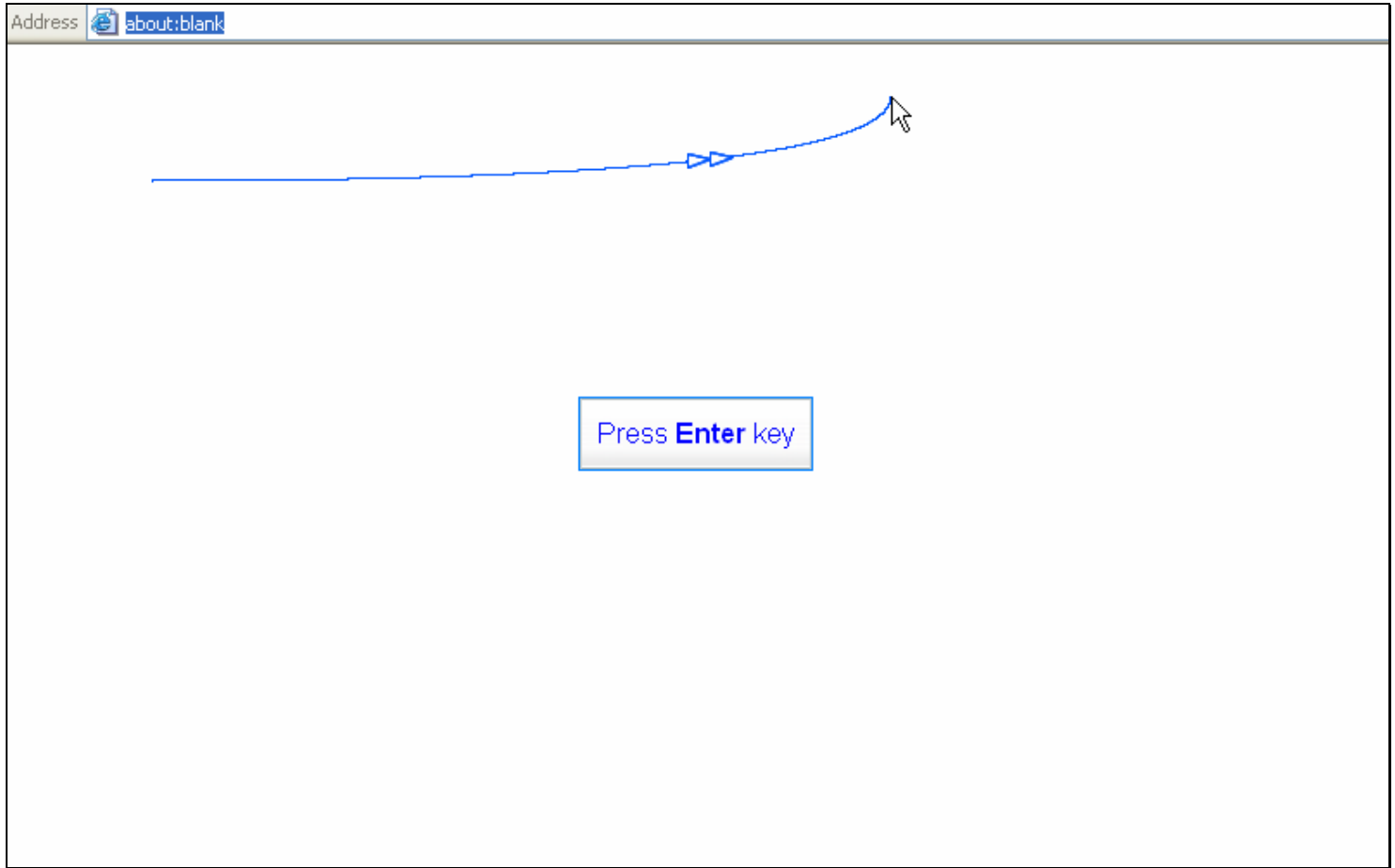


Text Captions

Select the **Address** text box.
Type in the **web site address** of the
MITAS Internet Property Management
site. This address may vary based on
the type of information you are trying to
access, and will vary based on the
agency for which you are working.

Notes

Slide 7 - Slide 7



Text Captions

Press Enter key

Notes

Slide 9 - Slide 9

Welcome to the **MITAS**
Internet Property Management Site

The **MITAS Internet Property Management Login** page appears

Please log in:

Web Profile: Administrator

Username:

Password:

Select the **Web Profile** combo box

Password is case sensitive.

Login Clear

Text Captions

Select the **Web Profile** combo box

The **MITAS Internet Property Management Login** page appears

Notes

Slide 10 - Slide 10

Welcome to the MITAS Internet Property Management Site

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Compliance**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Compliance** can view and input data for only tenant information. Your agency may have established both types of property manager items or only one option may be valid.

Please log in:

Web Profile: Administrator

Username: Administrator

Password: Administrator - Inquiry Only

Property Manager

Property Manager - Financials

Property Manager - Compliance

Select the appropriate **Property Manager** item
(Property Manager or Property Manager -
Compliance)

Text Captions

Select the appropriate **Property Manager** item (Property Manager or Property Manager - Compliance)

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Compliance**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Compliance** can view and input data for only tenant information. Your agency may have established both types of property manager items or only one option may be valid.

Notes

Slide 11 - Slide 11

Welcome to the MITAS Internet Property Management Site

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is

Login

Select the **Property Manager Number** text box, and input the appropriate number

Text Captions

Select the **Property Manager Number** text box, and input the appropriate number

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

Notes

Slide 12 - Slide 12

Welcome to the MITAS Internet Property Management Site

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is case sensitive

Login

Select the **Username** text box, and input your username (do not use an administrator username)

Text Captions

Select the **Username** text box, and input your username (do not use an administrator username)

Notes

Slide 13 - Slide 13

Welcome to the MITAS Internet Property Management Site

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Highlight Box

Password is case sensitive

Login

Select the **Password** text box, and input your password. **Passwords are case sensitive.**

Text Captions

Select the **Password** text box, and input your password. **Passwords are case sensitive.**

Notes

Slide 14 - Slide 14

Welcome to the MITAS Internet Property Management Site

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is case sensitive.

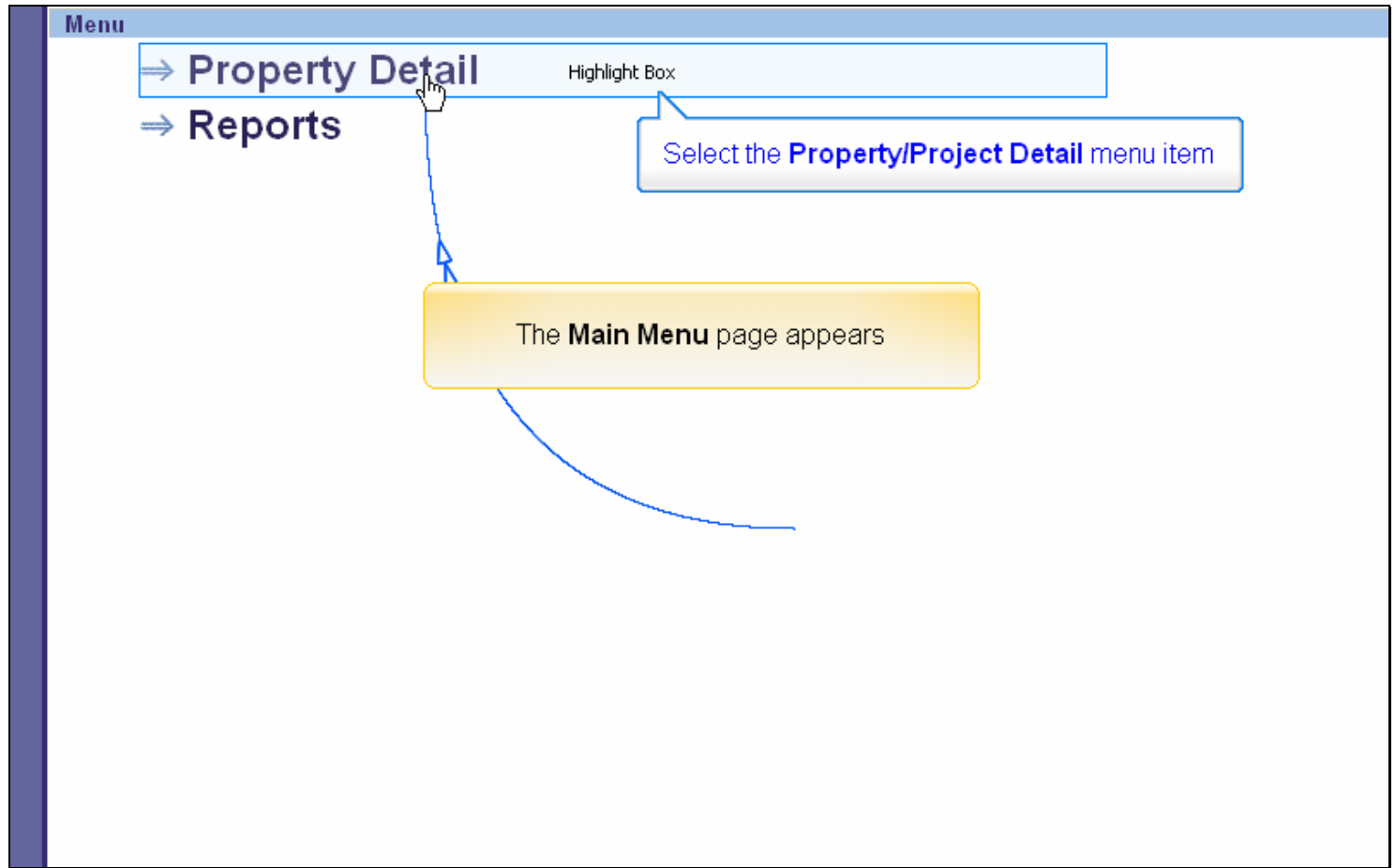
Click the **Login** button

Text Captions

Click the **Login** button

Notes

Slide 16 - Slide 16



Text Captions

The **Main Menu** page appearsSelect the **Property/Project Detail** menu item

Notes

Slide 18 - Slide 18

Property Information

O/P HSW123

Move-In/Move-out

Transactions Upload

Error Log

Retrieve Property:

Highlight Box

Retrieve

Property: 999999999999

Name

Property Address:

The Property/Project Information page appears

Line Number:

Ext:

000-0000

0000

000-0000

0000

Fax Number:

(000) 000-0000

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

The **Property/Project Information** page appears

Select the **Retrieve Property** text box, and input the Property Number

For security reasons, you must know the property number for which you are trying to create a transaction

Notes

Slide 19 - Slide 19

Property Information

O/P HSW123

Move-In/Move-out

Transactions Upload

Error Log

Retrieve Property:

Retrieve

Property: 999999999999

Property Address:

Phone Number:

Ext:

Fax Number:

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

Click the **Retrieve** button

Notes

Slide 21 - Slide 21

Property Information

O/P HSW123

Move-In/Move-out

Transactions Upload

Error Log

Verify the property address information is correct. If the information is not correct, contact the agency.

Click the Transactions Upload button to upload tenant data

Property: 75070

Name: MASON RIDGE

Property Address:

Phone Number:

Ext:

MASON RIDGE LIVING

(972) 547-6404

0000

1500 CENTRAL

(000) 000-0000

0000

MCKIN

Fax Number:

(000) 000-0000

The Property/Project Information page appears with the property data

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

The **Property/Project Information** page appears with the property data

Verify the property address information is correct. If the information is not correct, contact the agency.

Click the **Transactions Upload** button to upload tenant data

Notes

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Transaction Data Upload

O/P HSW196

Transactions Data Upload

Create the data file. Enter the path and file name of the file created below, and click the "Upload!" button (Example: "C:\uploads\datafile.txt"). The file will be copied to our server, of which you will receive confirmation. Then click the "Process Now" button to process the data. You will receive a link to a processing errors report. You should also receive a link to a processing errors report. You should also receive a link to a processing errors report. You should also receive a link to a processing errors report.

The **Transaction Data Upload** page appears

Enter the path and file name to upload:

Text Captions

The **Transaction Data Upload** page appears

Notes

Slide 24 - Slide 24

on Data Upload

Transactions Data Upload

The file containing the financial data to be uploaded must be saved as a **CSV** (comma delimited) file type. This is a common file type option available when saving a file using a spreadsheet.

name of the file created below, and click the "Upload!" button (Example: ...
plied to our server, of which you will receive confirmation. Then click the
d you will be presented with a link to a processing errors report. You still need
some fields may not be contained in the data file.

Enter the path and file name to upload: Highlight Box

Select the **Path and File Name to Upload** text box, and input the path and file name of the file containing the tenant data. If you do not know the path and file name, click the **Browse** button to search for the file.

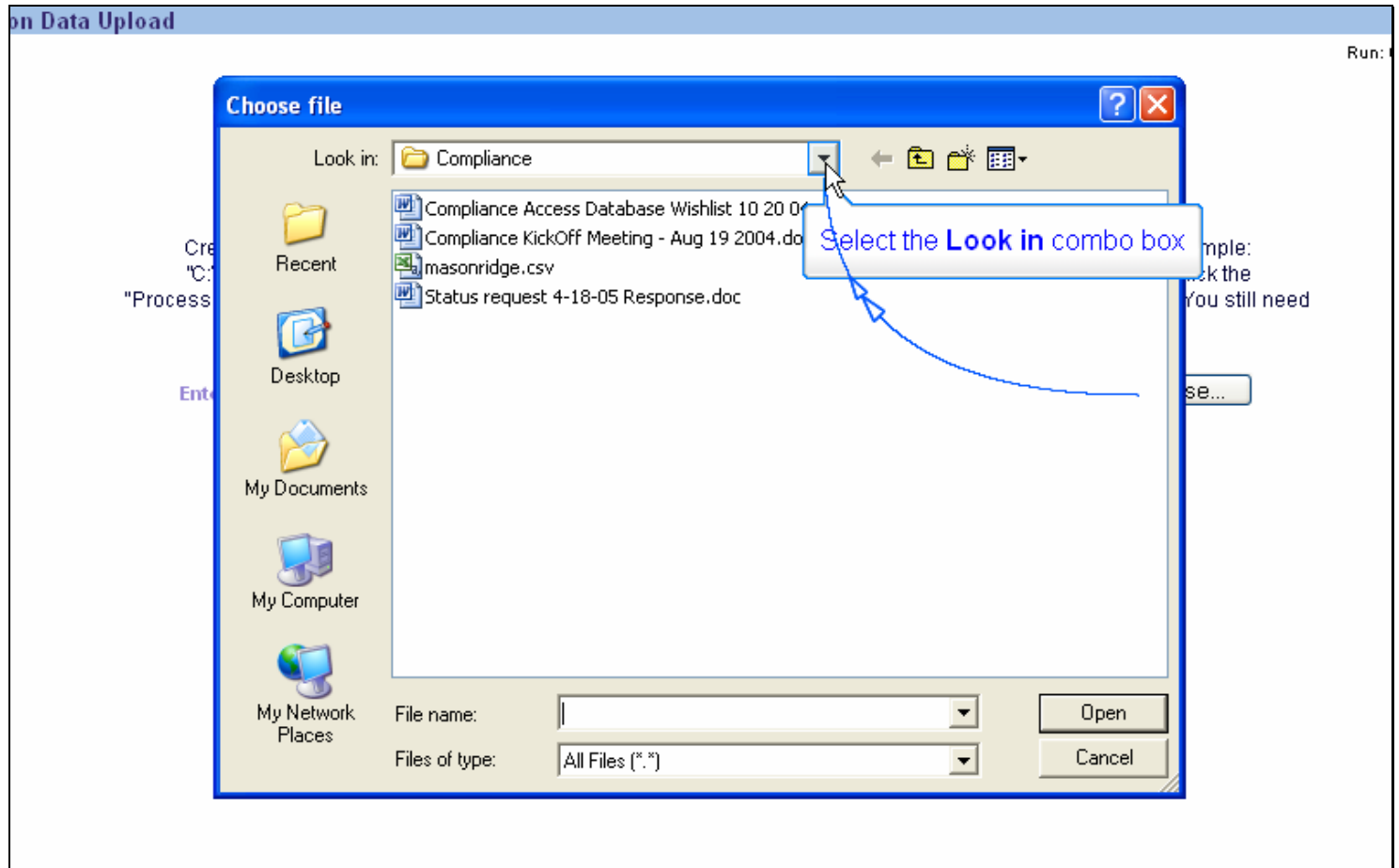
Text Captions

Select the **Path and File Name to Upload** text box, and input the path and file name of the file containing the tenant data. If you do not know the path and file name, click the **Browse** button to search for the file.

The file containing the financial data to be uploaded must be saved as a **CSV** (comma delimited) file type. This is a common file type option available when saving a file using a spreadsheet.

Notes

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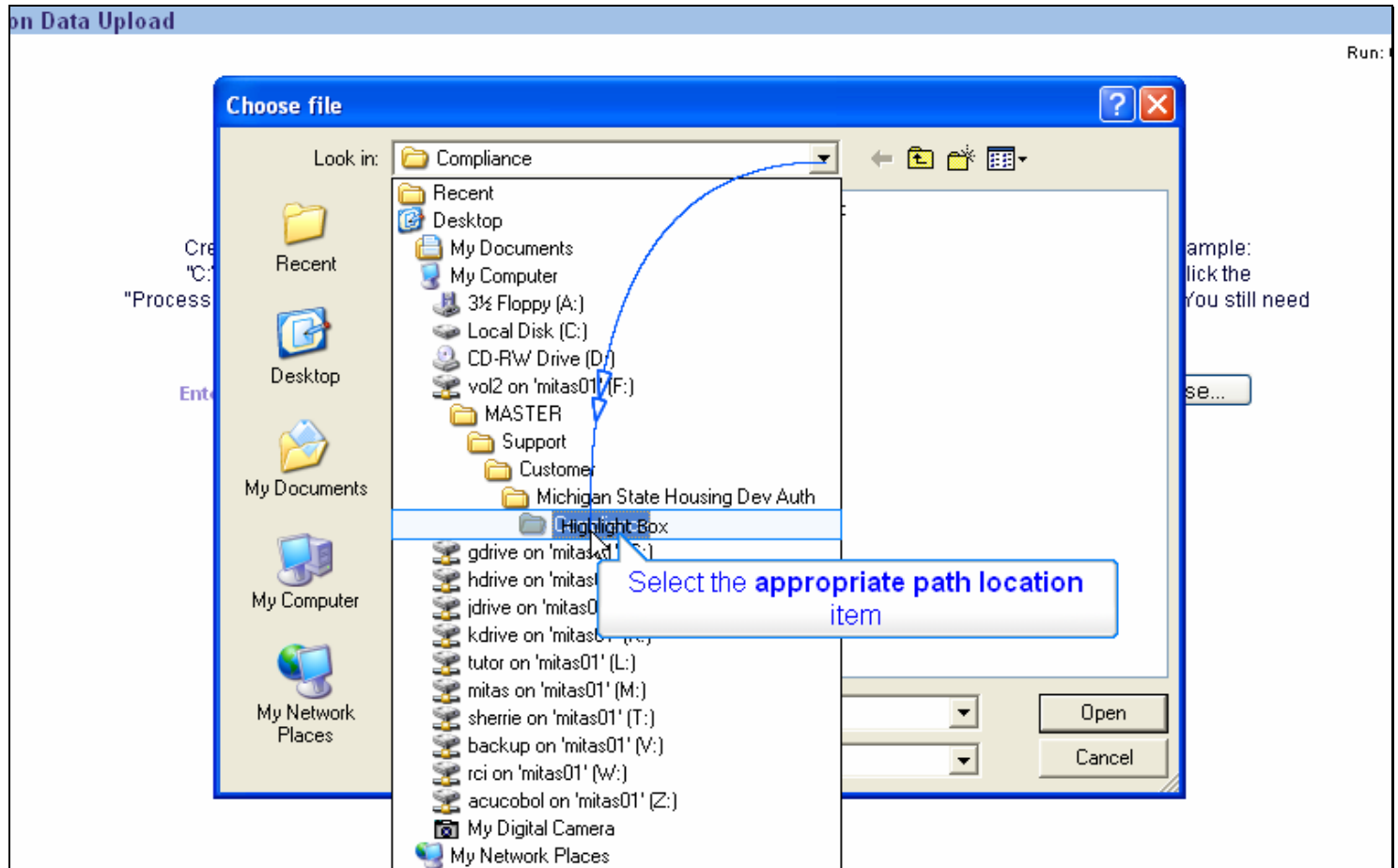


Text Captions

Select the **Look in** combo box

Notes

Slide 27 - Slide 27

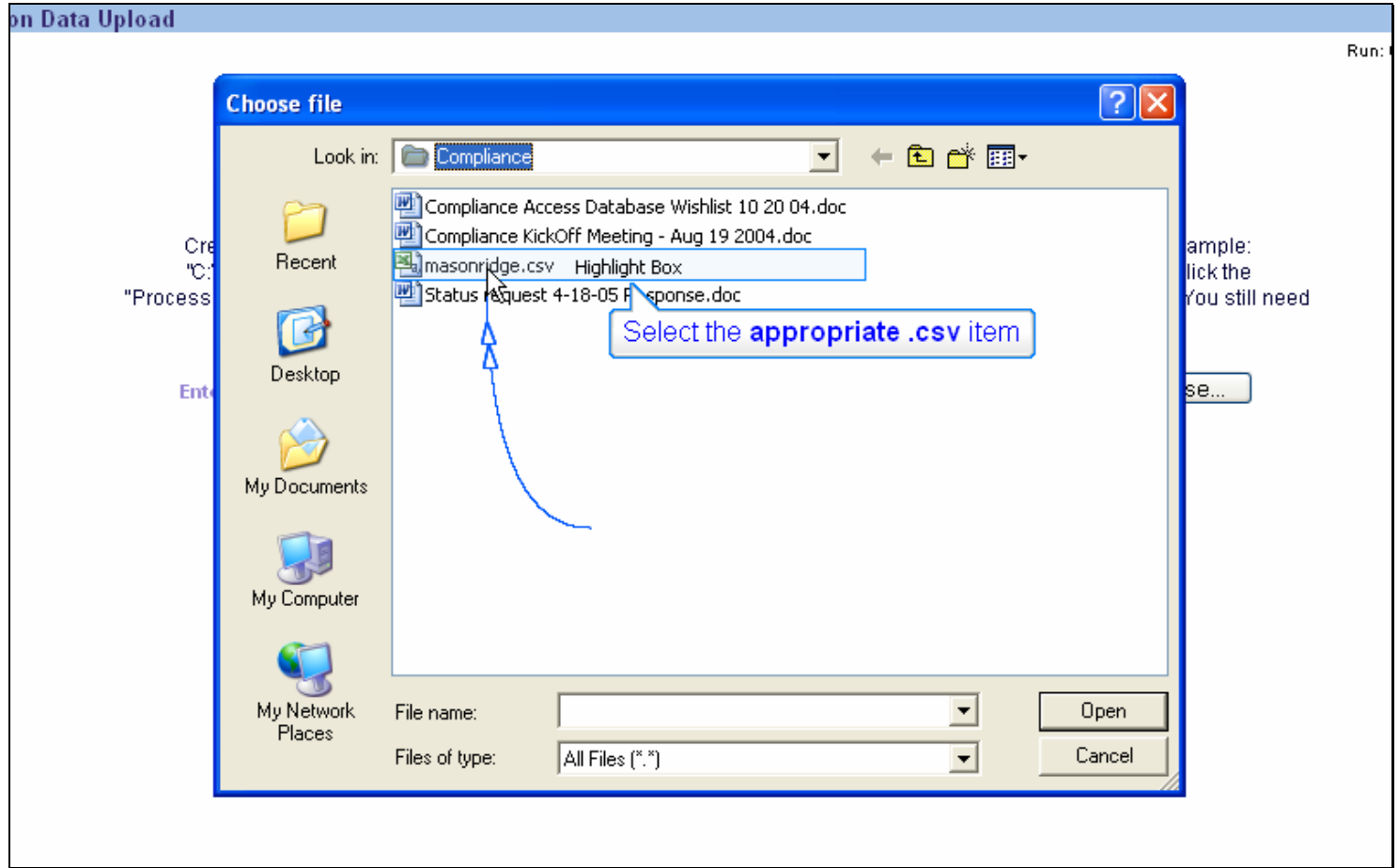


Text Captions

Select the appropriate path location item

Notes

Slide 28 - Slide 28

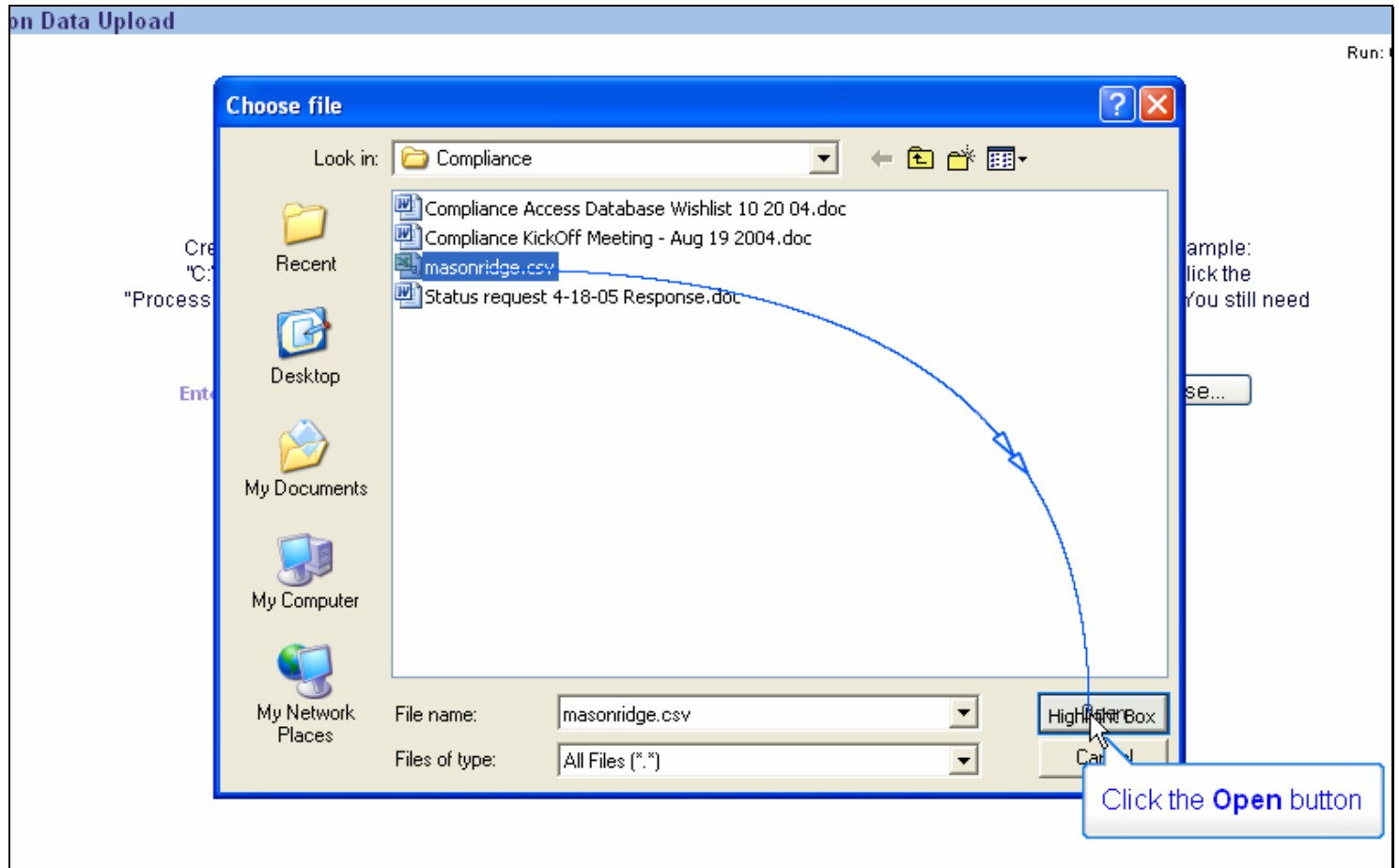


Text Captions

Select the appropriate .csv item

Notes

Slide 29 - Slide 29



Text Captions

Click the **Open** button

Notes

Slide 30 - Slide 30

on Data Upload

Run: 0

Transactions Data Upload

Create the data file. Enter the path and file name of the file created below, and click the "Upload!" button (Example: "C:\uploads\datafile.txt"). The file will be copied to our server, of which you will receive confirmation. Then click the "Process Now" button to load the information and you will be presented with a link to a processing errors report. You still need to verify the data as some fields may not be contained in the data file.

Enter the path and file name to upload:

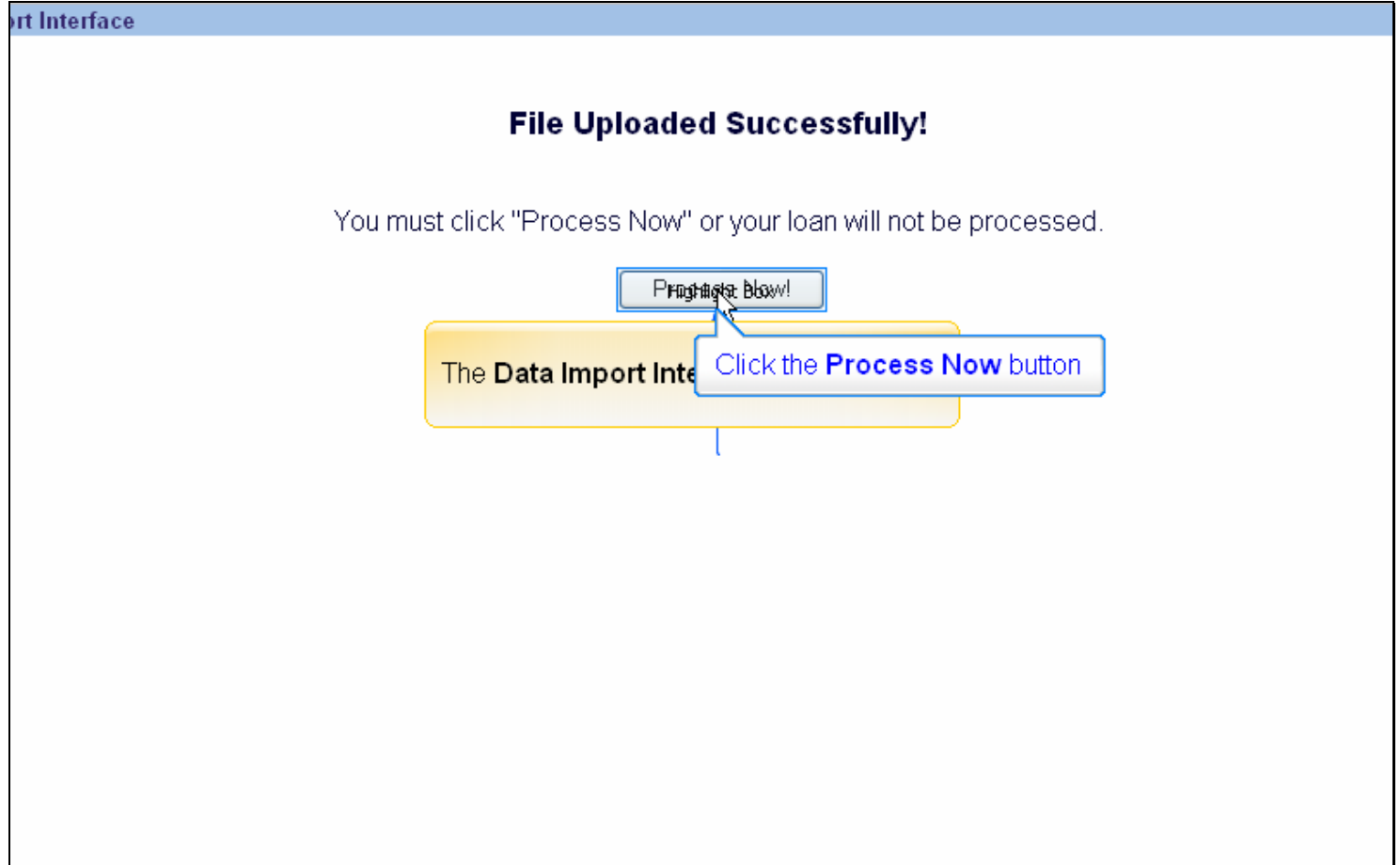
Click the **Upload!** button

Text Captions

Click the **Upload!** button

Notes

Slide 32 - Slide 32

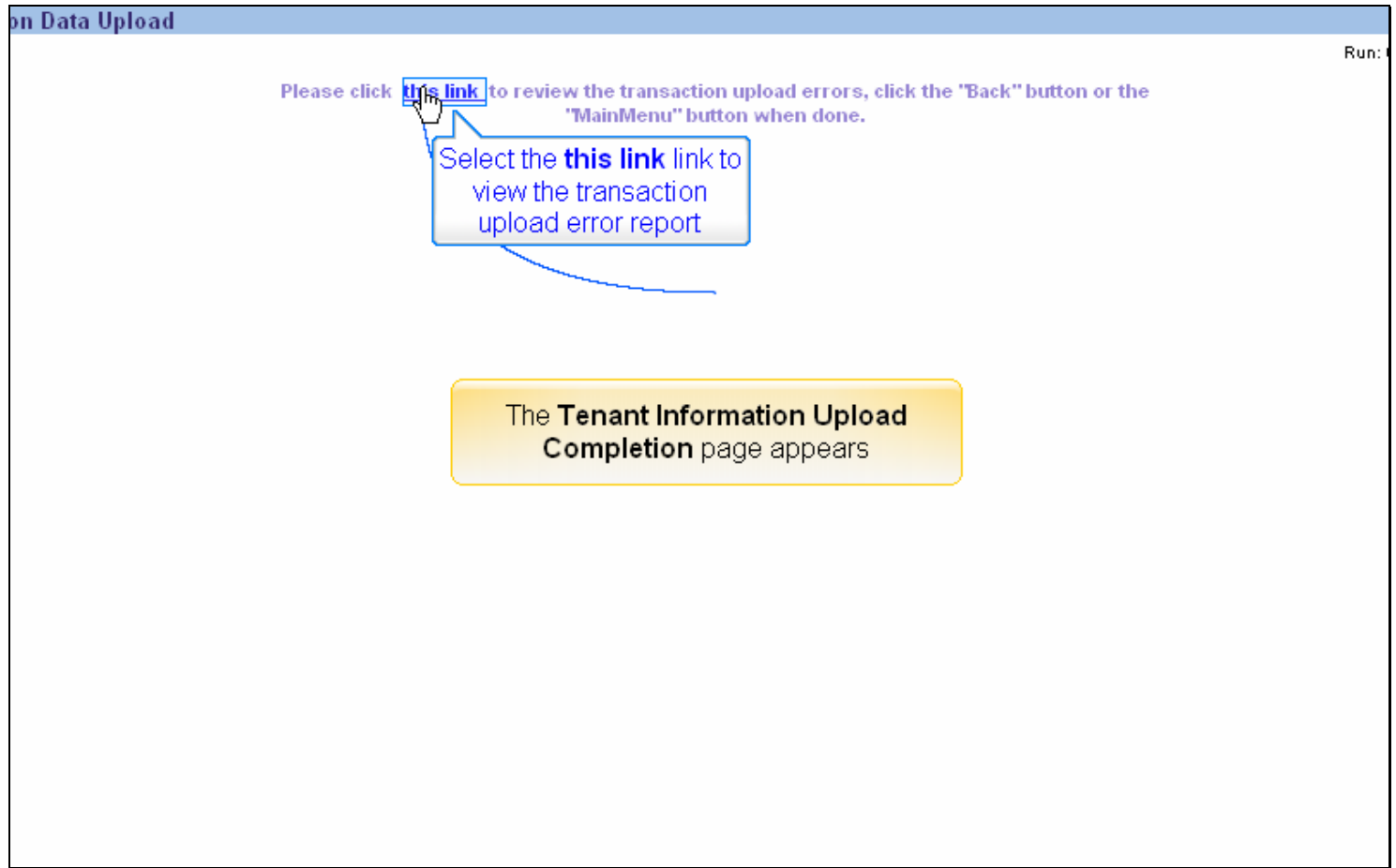


Text Captions

The **Data Import Interface** page appearsClick the **Process Now** button

Notes

Slide 34 - Slide 34



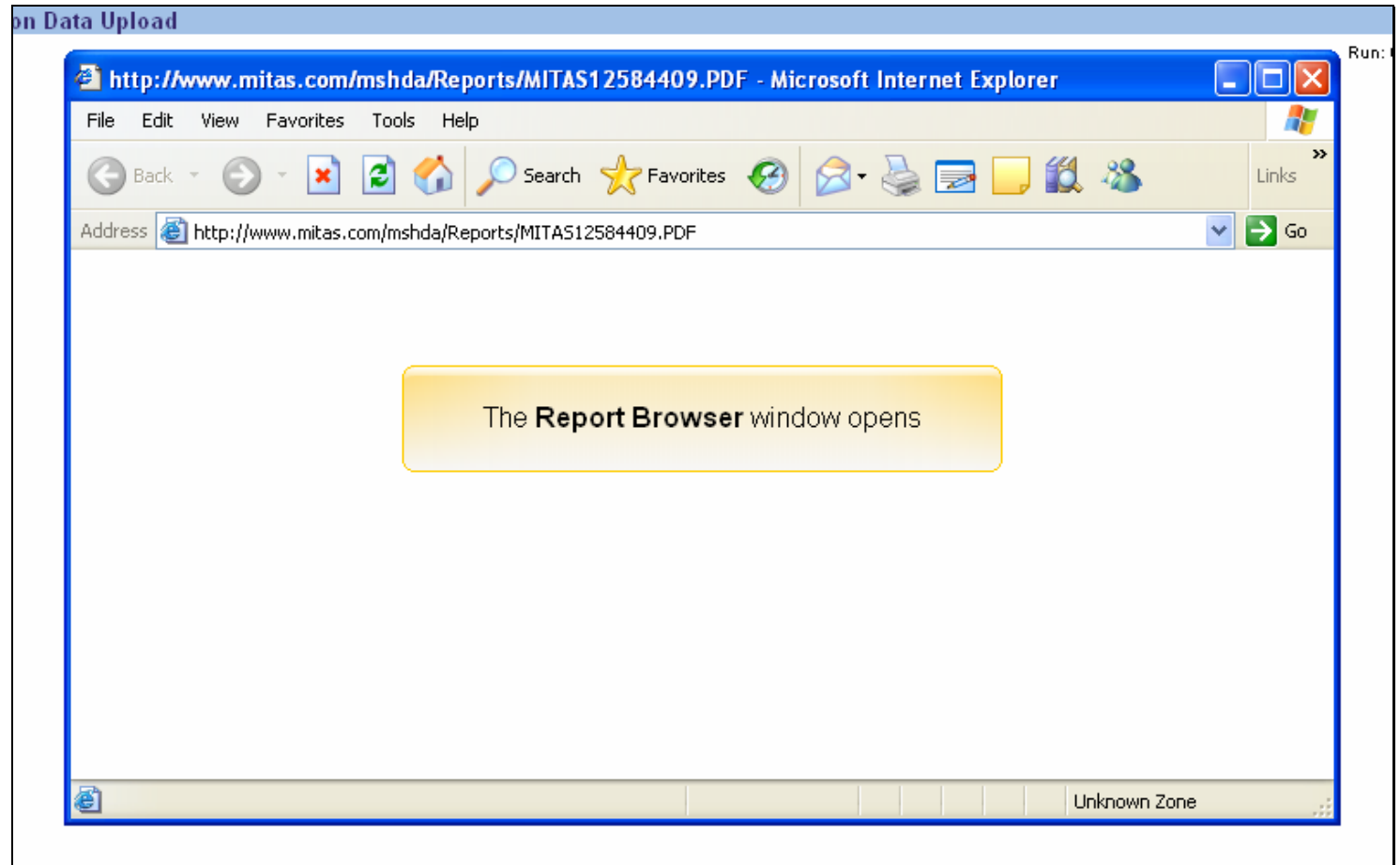
Text Captions

The **Tenant Information Upload Completion** page appears

Select the [this link](#) link to view the transaction upload error report

Notes

Slide 35 - Slide 35

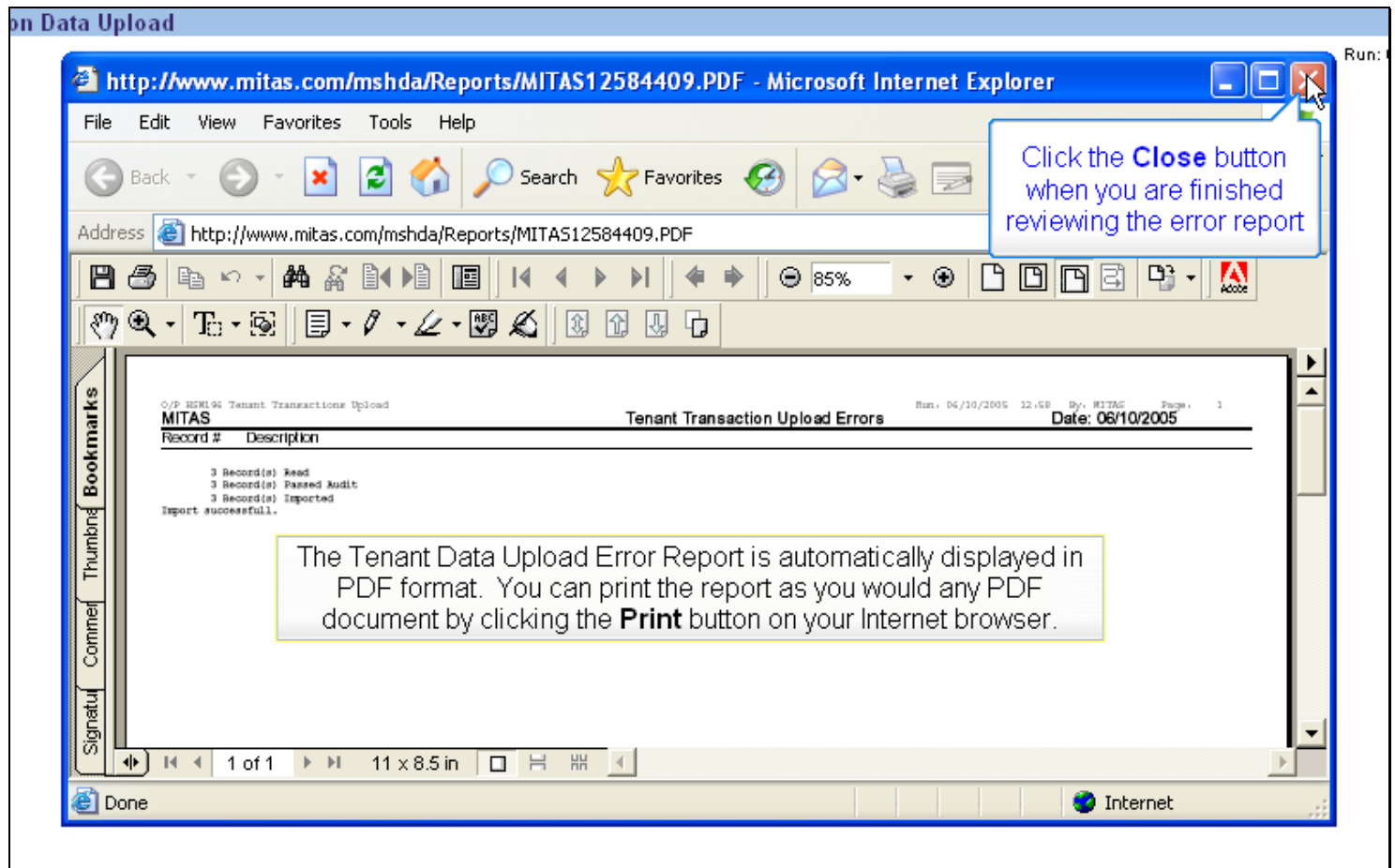


Text Captions

The **Report Browser** window opens

Notes

Slide 36 - Slide 36



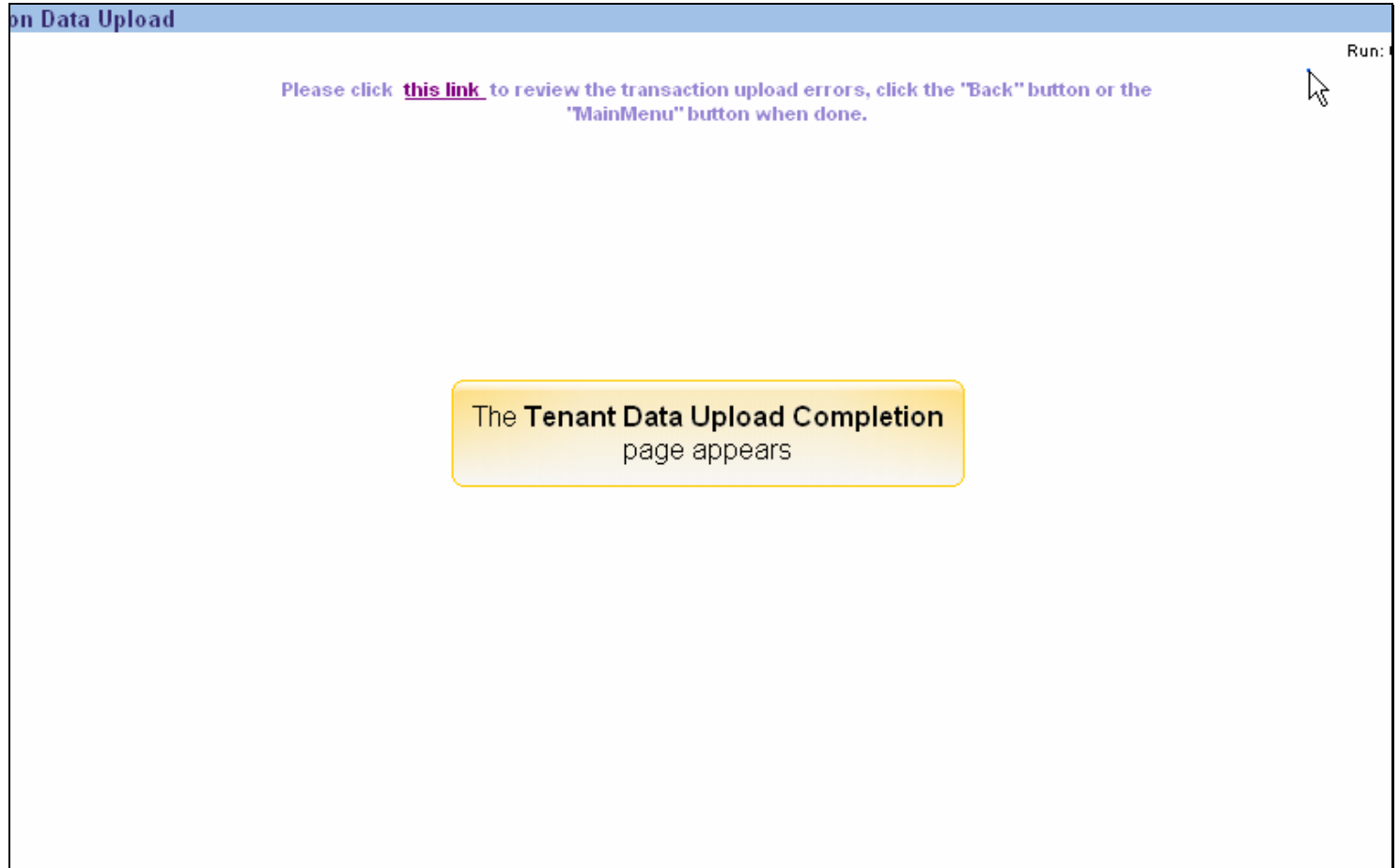
Text Captions

The Tenant Data Upload Error Report is automatically displayed in PDF format. You can print the report as you would any PDF document by clicking the **Print** button on your Internet browser.

Click the **Close** button when you are finished reviewing the error report

Notes

Slide 37 - Slide 37



Text Captions

The Tenant Data Upload Completion page appears

Notes

Slide 38 - Slide 38

The screenshot shows the MITAS Transaction Data Upload interface. On the left is a dark blue sidebar with the MITAS logo at the top. Below the logo are menu items: Screens, Transaction Data Upload (highlighted in yellow), Options, a Back button, Main Menu (highlighted with a blue box and a mouse cursor), System Help, Screen Help, and Logoff. The main content area has a light blue header with the title 'Transaction Data Upload' and a sub-header 'Q/P HSW196'. Below the header, there is a text instruction: 'Please click [this link](#) to review the transaction upload errors, click the "Back" button or "MainMenu" button when done.' A blue curved arrow points from the 'this link' text to the 'Back' button in the sidebar. Another blue curved arrow points from the 'MainMenu' button in the sidebar to the same text instruction. A white callout box with a blue border points to the 'Main Menu' button and contains the text: 'Click the **Back** button or **Main Menu** button when you are finished'.

Text Captions

Click the **Back** button or **Main Menu** button when you are finished

Notes

Slide 39 - Slide 39

The screenshot shows the MITAS Main Menu interface. On the left is a dark blue sidebar with the MITAS logo and a 'Main Menu' section containing links for 'System Help', 'Screen Help', and 'Logoff'. The main content area has a light blue header with a 'Menu' tab. Below the header, two menu items are listed: 'Property Detail' and 'Reports'. A blue arrow points from the 'Property Detail' item to a text box on the right that says 'Select the Property/Project Detail menu item'. Another blue arrow points from the 'Property Detail' item to a larger text box at the bottom that provides instructions on how to view tenant transactions. A yellow box highlights the 'Property Detail' item and the text box below it. A 'Highlight Box' label points to the 'Property Detail' item.

Menu

⇒ **Property Detail** Highlight Box

⇒ **Reports**

Select the **Property/Project Detail** menu item

From here, you can review the tenant data that was just uploaded or continue with other tasks.

The tenant transactions that were uploaded can be viewed on the **Tenant Transaction** page.

To view the transactions, choose the **Property/Project Detail** menu item. Retrieve the property from the **Property/Project** screen. Choose the **Move-In/Move-Out** option. Then choose the corresponding **Building** and **Unit**. Next, click the **Refresh** button to display the unprocessed transactions. Finally, choose the corresponding tenant to verify the tenant information was uploaded correctly.

Text Captions

The **Main Menu** page appears

Select the **Property/Project Detail** menu item

From here, you can review the tenant data that was just uploaded or continue with other tasks.

How to View Uploaded Tenant Transactions

The tenant transactions that were uploaded can be viewed on the **Tenant Transaction** page.

To view the transactions, choose the **Property/Project Detail** menu item. Retrieve the property from the **Property/Project** screen. Choose the **Move-In/Move-Out** option. Then choose the corresponding **Building** and **Unit**. Next, click the **Refresh** button to display the unprocessed transactions. Finally, choose the corresponding tenant to verify the tenant information was uploaded correctly.

Notes

Slide 40 - Slide 40

Property Information

O/P HSW123

Move-In/Move-out

Transactions Upload

Error Log

Retrieve Property:

Highlight Box

Retrieve

Property: 999999999999

Name

Property Address:

The Property/Project Information page appears

Phone Number: Ext:

000-0000 0000

000-0000 0000

Fax Number:

(000) 000-0000

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

The **Property/Project Information** page appears

Select the **Retrieve Property** text box, and input the Property Number

For security reasons, you must know the property number for which you are trying to view a transaction

Notes

Slide 41 - Slide 41

Property Information

O/P HSW123

Move-In/Move-out

Transactions Upload

Error Log

Retrieve Property:

Retrieve

Property: 999999999999

Property Address:

Phone Number:

Ext:

Fax Number:

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

Click the **Retrieve** button

Notes

Slide 43 - Slide 43

Property Information

O/P HSW123

Move-In/Move-Out

Transactions Upload

Error Log

Verify the property address information is not correct

Click the **Move-In/Move-Out** button to view unprocessed tenant data

Property: 75070

Name: MASON RIDGE

Property Address:

MASON RIDGE LIVING

1500 CENTRAL

MCKIN

Phone Number:

(972) 547-6404

(000) 000-0000

Ext:

0000

0000

Fax Number:

(000) 000-0000

The **Property/Project Information** page appears with the property data

Fiscal Year End: 00/00

Project

Stage

Date

Text Captions

The **Property/Project Information** page appears with the property data

Verify the property address information is correct. If the information is not correct, contact the agency.

Click the **Move-In/Move-Out** button to view unprocessed tenant data

Notes

Slide 44 - Slide 44

love-Out

Run: 0

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Select the **Building** combo box

Effective Date	Certification Type	Tenant Name	SSN
08/01/2003	Recertification	Lori Cooke	369874103

The **Tenant Transaction** page appears

Text Captions

The **Tenant Transaction** page appears

Select the **Building** combo box

Notes

Slide 45 - Slide 45

love-Out

Run: 0

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 37

Insert Transaction

Effective Date

Certification Type

Te

08/01/2003

Recertification

Lot

103

Select the appropriate building number item

Text Captions

Notes

Select the appropriate building number item

Slide 46 - Slide 46

love-Out

Run: 0

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Select the Unit combo box

Effective Date	Certification Type	Tenant Name	SSN
08/01/2003	Recertification	Lori Cooke	369874103

Text Captions

Select the Unit combo box

Notes

Slide 47 - Slide 47

love-Out

Run: 0

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

100

101

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Slide 48 - Slide 48

Love-Out

Run:

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Retrieve

Effective Date	Certification Type	Unit
08/01/2003	Recertification	100

Click **Retrieve** button to refresh the page with the unprocessed transaction data for this building and unit

Text Captions

Click **Retrieve** button to refresh the page with the unprocessed transaction data for this building and unit

Notes

Slide 49 - Slide 49

Love-Out

Property: 75070 Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction Retrieve

Effective Date	Certification Type	Tenant Name	SSN
08/01/2003	Recertification	Tori Cooke	369874103

The new transactions that have not been processed by the agency are shown on this page for this building's unit. The transactions that were automatically uploaded (as well as any manually input) are displayed until the agency has processed them.

Select the **appropriate tenant transaction link**

Text Captions

The new transactions that have not been processed by the agency are shown on this page for this building's unit. The transactions that were automatically uploaded (as well as any manually input) are displayed until the agency has processed them.

Select the **appropriate tenant transaction link**

Notes

Slide 50 - Slide 50

Love-Out

Run:

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

Effective Date: 08/01/2003

Certification Type: Recertification

Tenant

Delete

Family Members

TENANT INFORMATION

Name: Lori Cooke

The **Tenant Information** page appears

Income Source: W Other/Non-Federal Wage

Race: White

☐ Hispanic or Latino

Date of Birth: 01/26/1920 (MM/DD/YYYY)

No Family Members: 1

Number of Children: 0

Student: ☐ No ☐ Yes ☐ Yes & Qualify

Handicapped: ☒

Live In Aid: ☐

Temp ABS HH: ☐

Homeless: ☐

Special Needs: ☐

Move in Date: 08/01/2003 (MM/DD/YYYY)

Text Captions

The **Tenant Information** page appears

Notes

Slide 51 - Slide 51

Love-Out

Property: 75070 Name: MASON RIDGE

Building: 37
Unit: 100
Effective Date: 08/01/2003
Certification Type: Recertification

Tenant Delete Family Members

TENANT INFORMATION

Name:

Verify the tenant information, making any necessary changes. You can also add or delete information as needed.

Income Source:

Race: ☐ Hispanic or Latino

Date of Birth: (MM/DD/YYYY)

No Family Members: Number of Children:

Student: ☐ No ☐ Yes ☐ Yes & Qualify

Handicapped: ☒ Live In Aid: ☐

Temp ABS HH: ☐ Homeless: ☐

Special Needs: ☐

Move in Date: (MM/DD/YYYY)

Text Captions

Verify the tenant information, making any necessary changes. You can also add or delete information as needed.

Notes

Slide 52 - Slide 52

The screenshot displays the MITAS Move-In/Move-Out interface. On the left is a navigation menu with the MITAS logo and options like 'Screens', 'Move-In/Move-Out', 'Options', 'Back', 'Highlight Box', 'Main Menu', 'System Help', 'Screen Help', and 'Logoff'. The main area shows tenant details for 'Lori Cooke' at property '75070', building '37', unit '100'. It includes fields for SSN, income, race, date of birth, and family members. A callout box points to the 'Submit' button with the instruction: 'Click the **Submit** button when you have finished verifying and/or changing data for this tenant.'

Move-In/Move-Out
O/P HSW194

Property: 75070 Name: Building: 37
Unit: 100
Effective Date: 08/01/2003
Certification Type: Recertification

Tenant Delete Family M

TENANT INFORMATION

Name: Lori Cooke
SSN: 369874103
Income: 7,500 ☐ Over Income
Income Source: W Other/Non-Federal Wage
Race: White ☐ H
Date of Birth: 01/26/1920 (MM/DD/YYYY)
No Family Members: 1 Number of Child
Student: ☐ No ☐ Yes ☐ Yes & Qualify
Handicapped: ☒ Live In
Temp ABS HH: ☐ Home
Special Needs: ☐
Move in Date: 08/01/2003 (MM/DD/YYYY)
Move out Date: (MM/DD/YYYY)

Text Captions

Click the **Submit** button when you have finished verifying and/or changing data for this tenant.

Notes

Slide 53 - Slide 53

Love-Out

Run: 0

Property: 75070

Name: MASON RIDGE

Building: 37

Unit: 100

Insert Transaction

Retrieve

Effective Date	Certification Type	Tenant Name	SSN
08/01/2003	Recertification	Lori Cooke	369874103

From here, you can verify other tenant data, logoff the system or continue with other tasks.

Text Captions

The **Tenant Transaction** page appears

From here, you can verify other tenant data, logoff the system or continue with other tasks.

Notes

Slide 54 - End



Congratulations!
You have completed Compliance Automatic Tenant
Data Upload on the MITAS Internet Property
Management site.

Text Captions

Congratulations!
You have completed Compliance Automatic Tenant Data Upload on the MITAS Internet Property
Management site.

Notes